R9375-1

Research News for the U.S. Travel Industry

★ ★ ★

TRAVEL PRINTOUT

US Travel Data Center

April 1991 Volume 20, Number 4

Travel Weighs Heavily on Socio-Economic Status

United States adults in the "Upper Socio-Economic" category averaged more than seven trips in 1990, according to the new Socio-Economic Status category in the Data Center's National Travel Survey (NTS).

"This additional feature in the NTS will give us a better understanding of how educational and income characteristics influence traveler behavior," said Elizabeth Stewart, manager of market research at the Data Center.

The Socio-Economic Status (SES) category, which the Data Center began to analyze this year, includes four components; Low, Low-Mid, Upper-Mid and Upper. The following is a list of the attributes in each SES group. Note the following abbreviations: Less than high school complete (LHS), high school complete (HS), college complete or more (CD+).

- *Low SES*
  LHS and less than $25,000 annual family income
  HS and less than $20,000
  Some college and less than $20,000
  CD+ and less than $15,000

- *Low-Mid SES*
  LHS and $25,000 or more
  HS and $20,000 to $39,999
  Some college and $20,000 to $24,999
  CD+ and $15,000 to $19,999

- *Upper-Mid SES*
  HS and $40,000 or more
  Some college and $25,000 to $39,999
  CD+ and $20,000 to $29,999

- *Upper SES*
  Some college and $40,000 or more
  CD+ and $30,000 or more

Source Definition: Marriott Hotels and Resorts

The NTS, a monthly telephone survey of 1,500 adults representing the total adult population of the U.S., revealed that the higher Socio-Economic groups traveled more than the lower groups in 1990. Besides the Upper SES group averaging more than 7 trips in 1990, the Upper-Mid averaged 5.9 trips, the Low-Mid 4.7 trips and the Low SES group averaged 3.8 trips in 1990.

In addition, more than 83 percent of all adults in the Upper SES group traveled within the last 12 months, while only 43 percent of adults in the Low SES group traveled during the same time period.

Marital status was consistent among the Low-Mid (65 percent), Upper-Mid (65 percent) and Upper (70 percent) SES groups. But, only 39 percent among the population in the lower SES group were married. The number of separations, divorces and widows were also considerably higher in the Lower group.

The trend towards more frequent travel among dual-income households was evident in the Upper SES group. Forty-six percent of the Upper SES group, which showed the highest volume of travel among all groups, were dual income households, more than any other group.

Portions of the new NTS analysis regarding Socio-Economic Status will be included in the Data Center's 1990 Full-Year Report, which is due to be released by the end of May. Data Center members will be receiving a complimentary copy. For more information on the Socio-Economic Status groups, contact Elizabeth Stewart at (202) 293-1040.

IT'S TIME...

for the Data Center's 1991 Summer Vacation Travel Forecast

This year's summer projections include:

- Special analysis on the Gulf War
- Most popular regional destinations
- Modes of Transportation
- Duration of Summer Travel
- International Travel
- And more...

Order now and receive the forecast immediately following the May 21 news conference in Atlanta.

Data Center Basic Members pay $20/Non-members, $25
To Order call (202) 293-1040
(Data Center full members will receive a free copy).

Transportation Prices Decrease in March

The cost of travel in the United States continued to stabilize in March increasing only 0.4 percent over the previous month. For the second consecutive month, transportation prices, which decreased 4 percent, helped restrain the overall increase in travel prices, according to the Data Center's latest Travel Price Index (TPI).

The TPI, which measures seasonally unadjusted changes in the cost of travel in the U.S. increased to 146.2 (1982 - 84 = 100) during March.

For comparison, the overall cost of goods and services Americans purchased as measured by the Consumer Price Index (CPI) also showed a slight increase of 0.1 percent to 135.0 in March.

Travel Price Index and Components

March 1991 TPI Component	Monthly % Change Feb. 1991 to Mar. 1991	Annual % Change Mar. 1990 to Mar. 1991
Transportation	-4.0	9.0
Airline Fares	-2.5	13.5
Other Intercity Trans.	-2.0	4.2
Intracity Public Trans.	0.1	3.9
Motor Fuel	-5.1	5.9
Lodging	3.6	20.0
Food and Beverages Away From Home	0.2	3.8
Entertainment	-0.1	4.8
TRAVEL PRICE INDEX	0.4	10.1
CONSUMER PRICE INDEX	0.1	4.9

Source: U.S. Travel Data Center and the U.S. Bureau of Labor Statistics

For the fourth consecutive month, motor fuel costs decreased. Even though motor fuel prices decreased 5.1 percent in March, the cost of motor fuel did increase nearly 6 percent over the past 12 months.

Overall transportation costs decreased for the third consecutive month. But during the last 12 months, transportation prices increased 9 percent. In addition, airline fares decreased 2.5 percent in March, but still showed an increase of more than 13 percent during the last 12 months.

Overall, the TPI rose 10.1 percent and the CPI rose nearly 5 percent over the past 12 months.

Autumn Travel Continues to Prosper

Autumn travel has increased more than 16 percent since 1984, even though this past autumn increased only percent, according to the U.S. Travel Data Center's National Travel Survey.

Even though the Middle East crisis caused a slowdown in the autumn travel season, there were still 307 million U.S. resident person-trips taken in the months of September, October and November. (A person-trip is one person traveling 100 miles or more away from home).

One of the largest increases in autumn travel has come from vacation travel. In fact, autumn vacation travel has increased more than 39 percent since 1983.

The National Travel Survey Autumn Report can be purchased for $100, by contacting the Data Center at (202) 293-1040. (Data Center members will receive a complimentary copy). For additional information on the Autumn Travel Report, contact Elizabeth Stewart.

USTDC/AAA Gear up for News Conference

The Data Center and the American Automobile Association will hold its second annual Summer Vacation Travel Forecast/Memorial Day Weekend Forecast news conference on Tuesday, May 21 in Atlanta.

This year's forecast will include a special analysis of how the Gulf War and recession is expected to affect the summer vacation season. This analysis will review consumer's travel attitudes and the impact that the Gulf War had on travel.

Other information will include the most traveled regions in the U.S., the most popular modes of transportation, distance and duration of vacations, accommodation usage, U.S. travel to foreign countries and other forecasts. This year's 10th annual forecast can be purchased through the Data Center after the May 21 news conference in Atlanta. (Full members will receive a complimentary copy).

TRAVEL PRINTOUT is published monthly by the U.S. Travel Data Center, the national non-profit center for travel and tourism research and an affiliate of the Travel Industry Association of America, Two Lafayette Centre, 1133 21st Street, NW, Washington, D.C., 20036-3390. (202) 293-1040.

Dr. Suzanne D. Cook, Executive Director
Scott M. Dring, Editor

TRAVEL PRINTOUT reports on Data Center projects, national travel research conducted by other organizations and trends in the U.S. Travel Industry. Subscriptions are $75 per year; Foreign countries, $80 per year, payable in U.S. funds. ISSN: 0744-6233.

Discoveries...

The World Travel and Tourism Review

World international tourism arrivals is projected to reach a record high in 1990 with more than 415 million arrivals, up 47 percent since 1980, according to CAB International's *World Travel and Tourism Review.*

According to the report, the Americas are a vital region for world tourism, recording one-quarter of the world's international tourism receipts in 1989. North America enjoyed the largest increase in arrivals in the America region in 1989 and accounts for 70 percent of all international arrivals in the region.

Europe boasts 15 percent of the world's population and 36 percent of the world GNP, but garners half of all international tourism receipts, according to the report. Southern Europe and Western Europe each receive 35 percent of all arrivals in the European region. Eastern Europe currently captures 19 percent of arrivals and 2 percent of receipts in the region.

The report says there are dynamic changes that are taking place today in world tourism, but which will be even more evident in the next few years. For example, changes in work habits and changes in working conditions will yield greater leisure time for a greater number of people to participate in tourism and recreation.

The report also predicts that as people become better educated and have greater exposure to other cultures and societies, they will want to visit places about which they have read or heard.

The World Travel and Tourism Review presents statistical data series, forecasts, trends analysis, plus support information on tourism in both the developed and developing world. The 250-page report can be purchased for $170. For more information or to order the publication, contact Carla Long Casler of CAB International in Tucson at (800) 528-4841.

Visitor Volume at National Parks

Region	FEB 1991 visits	% Change from FEB 1990	Year to [illegible] % Change [illegible]
NEW ENGLAND	310,188	14.5*	10.9*
MIDDLE ATLANTIC	1,040,315	20.2	9.1
SOUTH ATLANTIC	3,410,391	-1.4	-4.8
EAST SOUTH CENT.	912,009	6.0	2.1
EAST NORTH CENT.	248,734	11.9	16.2
WEST NORTH CENT.	219,874	18.6	3.5
WEST SOUTH CENT.	484,826	-8.2	-15.0
MOUNTAIN	1,625,220	14.5	6.4
PACIFIC	2,784,850	9.0	6.5
TOTAL	11,036,407	6.4	1.7

* Percent change figures may not be consistent with those previously reported due to National Park Service revisions.

Census regions: New England: Conn., Maine, Mass., N.H., R.I., Vermont. Middle Atlantic: N.J., N.Y., Penn. S. Atlantic: Del., District of Columbia, Fla., Ga., Md., N.C., S.C., Va., W.Va. East South Central: Ala., Ky., Miss., Tenn. East North Central: Ill., Ind., Mich., Ohio, Wis. West North Central: Iowa, Kan., Minn., Mo., Neb., N.D., S.D. West South Central: Ark., La., Okla., Texas. Mountain: Ariz., Colo., Idaho, Mont., Nev., N.M., Utah, Wyo. Pacific: Alaska, Calif., Hawaii, Ore., Wash.

KOA Conducts Gallup Survey

A recent Gallup survey, conducted for Kampgrounds of America (KOA), revealed that nearly one-third of this year's vacationers plan to camp overnight at a campground, park or lake facility and 43 percent of these vacationers plan to camp more in 1991.

"Campsite and cabin reservations are on the upswing compared to a year ago," said Kent Zimmerman, vice president of marketing and franchise services at KOA, in an April news release. "Our campground owners are reporting earlier than usual activity."

All results of the Gallup Travel Expectations Survey are available upon request. For more information, contact Ray Todd of KOA at (406) 248-7444.

To submit your company's travel research projects, send a brief description of the report, including the price, address, and contact name, to Scott Dring, U.S. Travel Data Center, 1133 21st Street, Washington, D.C. 20036.

Data Center Holds Membership, TOF Meetings

The USTDC Membership Committee met on April 1 in Washington to discuss the current status of Data Center membership.

Among the committee's recommendations were the needs of the Data Center to strengthen its marketing programs in the areas of contract research, according to staff liaison Lori Litzenberg.

On March 25, the 1992 USTDC's Travel Outlook Forum Planning Committee gathered in Washington to discuss ideas and make suggestions for the agenda of the 1992 Travel Outlook Forum. The forum will be held October 23, 1991 at the Sheraton Washington Hotel.

The Committee decided to work within the overall theme of the Travel Industry Association's National Conference, "Surviving and Thriving: The New Rules and Realities," to be held following the Travel Outlook Forum on October 24.

Current Travel Indicators - 1990/91

	Month	Value	Units	Percent Change Last Month	Year Ago	Year To Date
Establishment Receipts or Retail Sales						
Hotels, Motels, Other Lodging Places(1)	Feb	$5,359	million	16.4	-1.9	-0.9
Eating and Drinking Places(2)	Mar	$15,555	million	1.4	2.6	2.1
Gasoline Service Stations(2)	Mar	$10,707	million	0.6	7.2	8.1
Commercial Lodging Demand						
Hotel/Motel Occupancy Rates(3)	Feb	59.9	percent	1.0	-6.4	-4.8
Real Demand for Commercial Lodging(4)	Feb	59.7	million	21.0	-2.2	-0.9
Airline Passenger Traffic (5)						
Domestic Revenue Passenger-Miles	Mar	27.0	billion	16.4	-8.6	-5.2
Int'l Revenue Passenger-Miles	Mar	7.0	billion	35.6	-19.9	-16.2
Highway Traffic Volume (6)						
Rural Arterial Passenger-Miles	Feb	35.8	billion	-2.6	0.2	-2.1
Rail Passenger Traffic (7)						
Amtrak Passenger-Miles	Feb	445.2	million	-5.3	8.6	9.2
Travel Price Index (1982 - 84 = 100) (8)	Mar	146.2		0.4	10.1	11.4
U.S. Resident Travel						
Total Person-trips(9)	Dec	93.6	million	-1.1	-13.7	1.1
Vacation Person-trips(9)	Dec	63.2	million	1.8	-19.1	0.6
Total Person-nights(10)	Dec	402.5	million	3.8	n/a	n/a
Vacation Person-nights(10)	Dec	322.3	million	8.1	n/a	n/a
Visitor Volume at National Park Service Areas (11)						
Recreation Visits	Feb	11,036,407		14.6	6.4	1.7
Overnight Stays	Feb	482,732		22.4	4.9	4.2
Foreign Arrivals to the U.S.						
From Overseas(12)	Oct	1,266,441		-7.1	11.0	6.2
From Canada(13)	Feb	992,956		10.3	5.9	2.1
From Mexico(12)	Oct	111,246		10.7	20.9	7.4
U.S. Citizen Departures						
To Overseas(12)	Oct	1,160,700		-14.1	3.3	8.8
	Nov	1,069,800		-7.8	4.2	8.4
To Canada(13)	Feb	469,383		22.9	3.8	-1.0
Domestic Demand for Gasoline						
Barrels/Day(14)	Feb	6,715	thousands	-0.4	-5.8	-2.5

(1) Source: Smith Travel Research, seasonally adjusted. (2) Preliminary; revised monthly. Source: Bureau of the Census. (3) Source: Smith Travel Research, seasonally adjusted, 1988 and 1987 data have been revised. (4) Smith Travel Research, unadjusted room nights sold. (5) Preliminary; U.S. scheduled service air carriers. Source: Air Transport Association. (6) Preliminary revised monthly. Source: Federal Highway Administration. (7) Source: National Railroad Passenger Corporation (Amtrak). (8) Source: U.S. Travel Data Center and Bureau of Labor Statistics. (9) Source: U.S. Travel Data Center. (10) U.S. Travel Data Center. Data is not comparable to earlier published numbers due to revised methodology. (11) Preliminary; unadjusted for differences in reporting units. Source: National Park Service. (12) Source: U.S. Travel and Tourism Administration. Mexican data reflect 194 arrivals only. (13) Statistics Canada. (14) Preliminary; Source: U.S. Department of Energy

US Travel Data Center

Two Lafayette Centre
1133 21st Street, NW
Washington, D.C.
20036
(202) 293-1040

WASHINGTON, DC 20036
1 PM
6 MAY
1991

U.S. POSTAGE
PAID
FIRST CLASS
PERMIT NO. 8523
WASHINGTON, D.C.

Jeanne Long
Congressional Information
Service
4520 East-West Hwy., Ste. 800
Bethesda, MD 20814

April 1991

TRAVEL PRINTOUT

Research News for the U.S. Travel Industry